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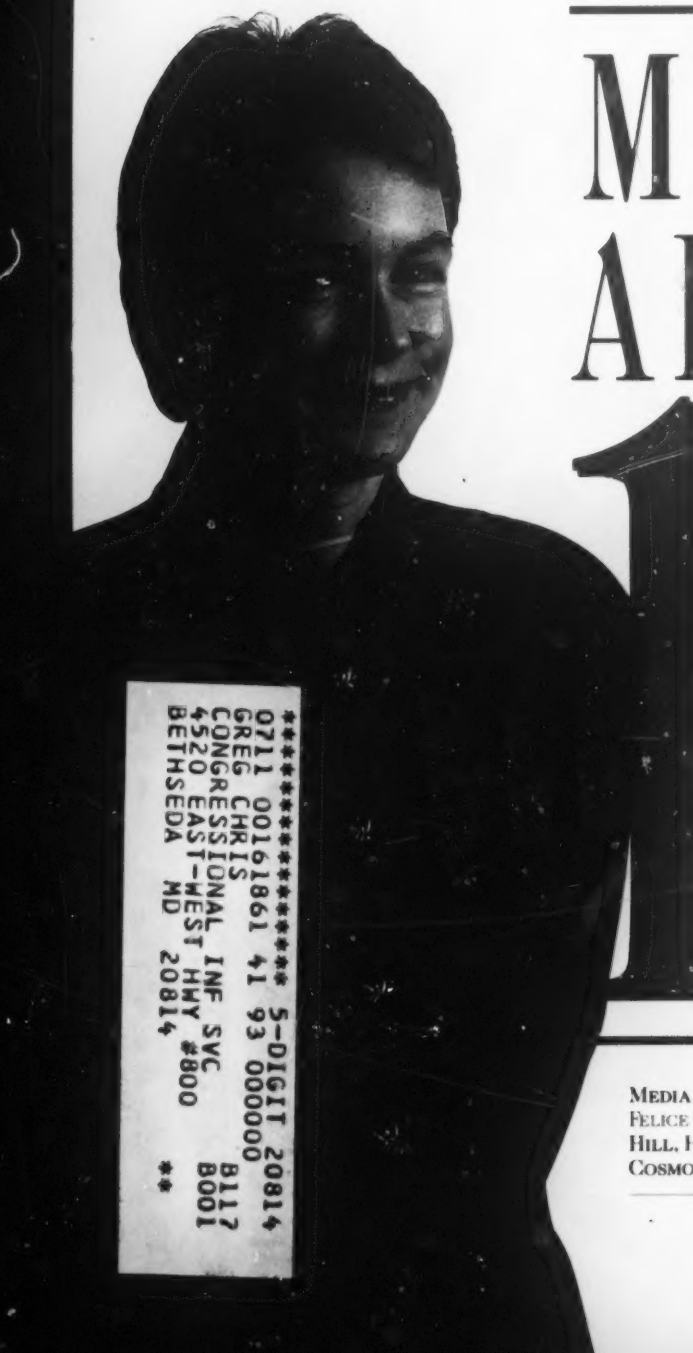

M·E·D·I·A ALL·STARS 1989

MEDIA DIRECTOR
FELICE KINCANNON
HILL, HOLLIDAY, CONNORS,
COSMOPULOS, BOSTON

MARKETING & MEDIA DECISIONS

COVER STORY

THE 1989 MEDIA ALL STARS

In each of nine areas of expertise, this year's All-Stars and their Star Watch colleagues have proven that creative thinking and innovative buying and planning can be the rule and not the exception.

MEDIA DIRECTOR: FELICE KINCANNON 36

What most people might consider extraordinary — helping land the Infiniti account for Hill, Holliday, Connors, Cosmopulos and being named general manager of the agency's Boston office — she's handled with aplomb. Star Watch: Ann Meschery, Backer, Spielvogel, Bates, New York.

ASSOCIATE MEDIA DIRECTOR: CINDY SCHULTZE BORGES 47

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Young & Rubicam's clients say she knows the networks better than they know themselves. Star Watch: Fred Dubin, NW Ayer, New York

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PRINT: KATRINKA SHARPE 75

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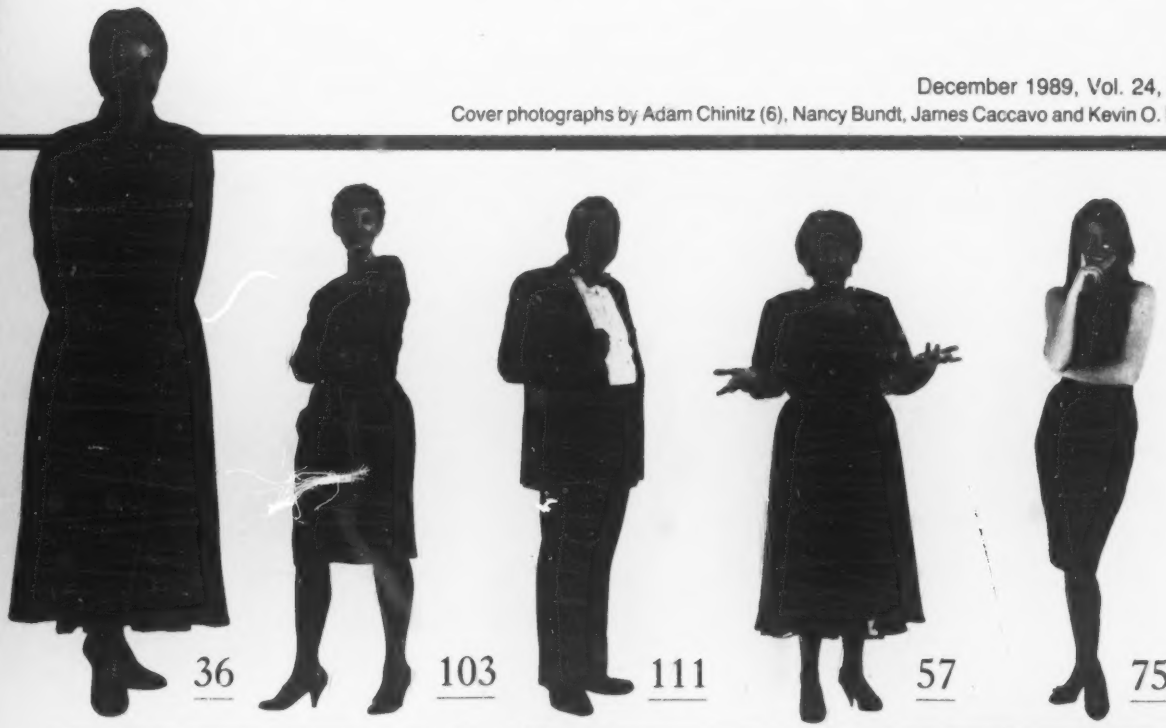
December 1989, Vol. 24, No. 12

Cover photographs by Adam Chinitz (6), Nancy Bundt, James Caccavo and Kevin O. Mooney



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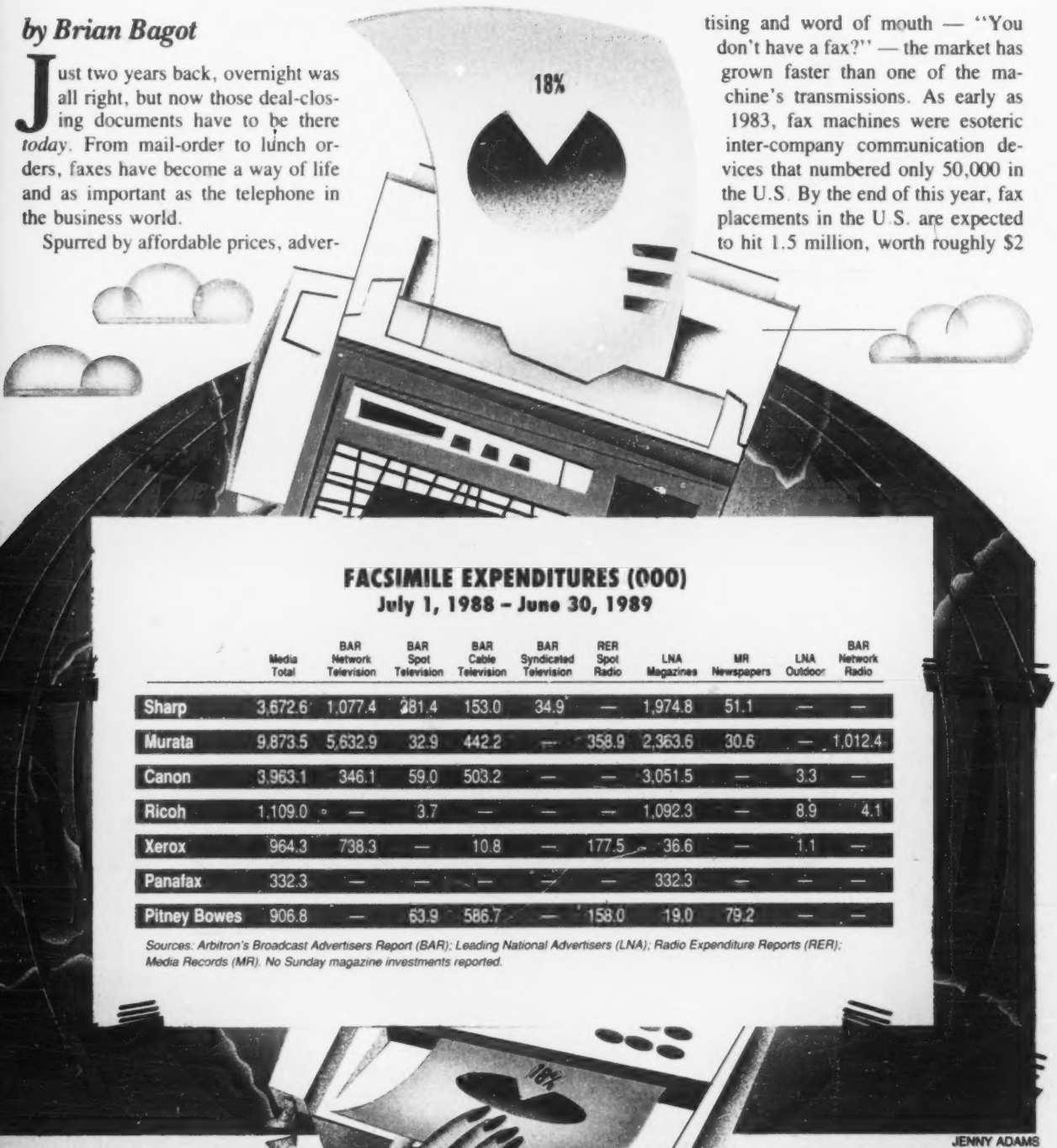
BRAND REPORT

FAX FACTS

by Brian Bagot

Just two years back, overnight was all right, but now those deal-closing documents have to be there *today*. From mail-order to lunch orders, faxes have become a way of life and as important as the telephone in the business world.

Spurred by affordable prices, advertising and word of mouth — "You don't have a fax?" — the market has grown faster than one of the machine's transmissions. As early as 1983, fax machines were esoteric inter-company communication devices that numbered only 50,000 in the U.S. By the end of this year, fax placements in the U.S. are expected to hit 1.5 million, worth roughly $2



FACSIMILE EXPENDITURES (000)
July 1, 1988 – June 30, 1989

	Media Total	BAR Network Television	BAR Spot Television	BAR Cable Television	BAR Syndicated Television	RER Spot Radio	LNA Magazines	MR Newspapers	LNA Outdoor	BAR Network Radio
Sharp	3,672.6	1,077.4	281.4	153.0	34.9	—	1,974.8	51.1	—	—
Murata	9,873.5	5,632.9	32.9	442.2	—	358.9	2,363.6	30.6	—	1,012.4
Canon	3,963.1	346.1	59.0	503.2	—	—	3,051.5	—	3.3	—
Ricoh	1,109.0	—	3.7	—	—	—	1,092.3	—	8.9	4.1
Xerox	964.3	738.3	—	10.8	—	177.5	36.6	—	1.1	—
Panafax	332.3	—	—	—	—	—	332.3	—	—	—
Pitney Bowes	906.8	—	63.9	586.7	—	158.0	19.0	79.2	—	—

Sources: Arbitron's Broadcast Advertisers Report (BAR); Leading National Advertisers (LNA); Radio Expenditure Reports (RER); Media Records (MR). No Sunday magazine investments reported.

JENNY ADAMS

billion, according to Judy Pirani, associate director for image communication systems at BIS CAP International, a Norwell, Mass.-based market research company. The company projects placements to hit 2.7 million by 1992.

Right now there are seven industry leaders that control between 70% and 90% of the market's unit sales, depending on who you talk to. Industry sources place Sharp in the leader's position, with 19%-21% of the market, followed by Murata with 15%-17% and Canon and Ricoh in an almost dead heat. One estimate says their shares are 16% for Canon and 15% for Ricoh; another says they both fall in the 10%-11% range.

The fax boom began around 1987, when placements were about 475,000, but it was during 1988 when the market really started to buzz. As Pirani points out, "The installed base started hitting a critical mass. People who didn't have fax machines were starting to feel the pressure from people who did have fax machines," she says. "When these people went out to examine getting one, especially if they ran a small business, they discovered that they're not that expensive after all."

Also, fax machines are getting easier to buy. There has been a shift from the manufacturer's salesforce to equipment dealers and retail stores.

"Before 1987," says Pirani, "you could only buy from an office equipment dealer or a direct sales guy. In 1988 distribution really expanded, so you could go into a discounter or the home-office departments of department stores and buy one."

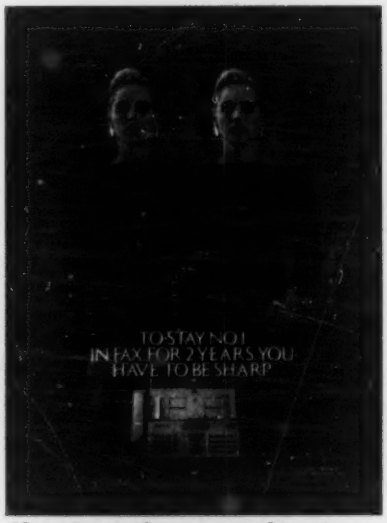
As the market has grown, so has the sophistication of its advertising efforts. Several years ago most of the ads were primarily in office-management books and focused on telling the buyer what fax was all about. Today, print is still the dominant medium, but business publications like *Business Week*, *Fortune* and *Forbes* carry product-specific ads emphasizing product features like automatic page cutters, auto dialing and plain-paper capabilities.

Several companies have sought a unique positioning, such as Sharp, which stresses the company's leading position in the market, or Pitney Bowes, which uses humor to get its message of legible fax copies across.

Sharp and Murata are also heavily into sports tie-ins. Sharp has placement in *Hoop* and *Goal* magazines, as well as being a sponsor of the U.S. Tennis Open and college football. Murata sponsors the Murata Senior Golf Tournament in Dallas, in addition to being one of Wimbledon's major sponsors.

Trade advertising also plays a large role in the fax market as manufacturers target MIS specialists and other influencers at the corporate level. Titles used include *The Office*, *Computer Resale Channel* and *Byte*.

With the business segment already dependent on fax, the next frontier is the home-office market, where manufacturers are placing new emphasis. Ricoh has two personal fax models, the FAX89 and FAX90, which list for



Sharp's number-one ranking is trumpeted in its ads.

$1,695 and $1,895, respectively. However, with fax, like other electronic products, there's a gap between list and actual prices. For instance, the Sharp FO220 lists for $1,595, but has a general everyday retail of $650 at discount stores.

But just because a fax has a low price tag doesn't mean low quality. John Plet, assistant general manager of advertising for Panasonic Office Automation, says, "People have to learn not to differentiate low- and high-end by price. It's on features and the need of the potential customer. It's not lower quality; it's a less-featured machine."

In addition to business-to-business communication and home-office use, fax applications are turning up in some unusual, but practical places. Even the Internal Revenue Service has equipped about four out of 10 IRS centers to accept fax transmissions to help resolve audit, collection and other matters for clients. And in New Jersey, the labor department says unemployment insurance claimants may file their appeals by fax.

With fax as widespread as it is, and growing, it's not surprising that laws should emerge to control fax abuse. In October, Connecticut adopted the nation's first law banning the transmission of junk fax. Senders of unsolicited advertising messages by fax can be fined $200 or have to pay damages, whichever is greater. Other states considering such measures include New York, Maryland and Oregon.

The next wave: Expect manufacturers to push their plain-paper abilities, since the plain alternative not only uses regular paper, but provides copies that are much clearer than the thermal paper. As these machines proliferate, their costs will fall and competition will heighten to get current faxers to trade up.

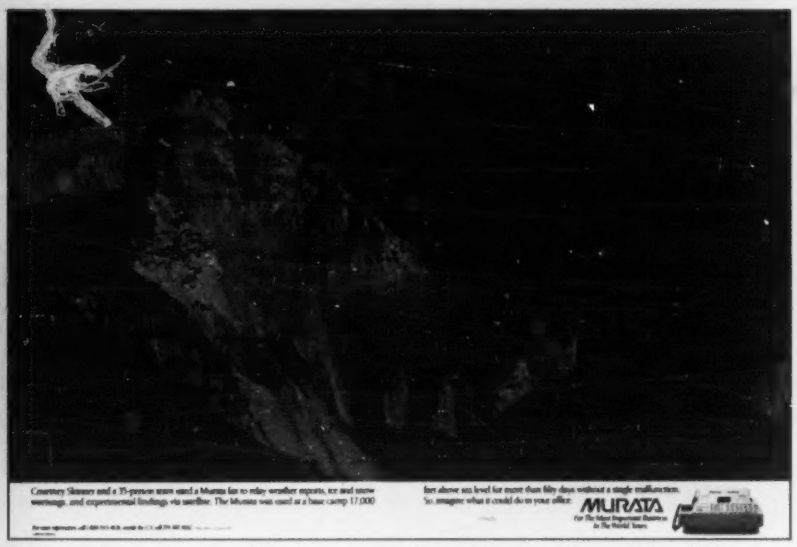
Here's how the major marketers send out their messages to their prospects.

Sharp

Sharp, the leader in fax unit sales for two years running, is building on that theme in its ads as it aims its line of machines at the low, middle and upper segments of the market. Sharp's market share, based on unit sales, is unofficially estimated to be 19%-21% by industry sources.

With fax becoming part of the language and consumers more aware of what fax machines do, the company now thinks it's time to take a different course with the creative. Norman Hajjar, senior vice president, group director, at Griffin Bacal, Sharp's agency, says, "It's totally out of the education mode now, except as it relates to specific features of the facsimile. The concept of fax no longer needs to be emphasized," he says.

"Principally, what we're doing is trumpeting our number-one ranking in facsimile sales for two years in a row," he explains. "It's a claim that really



Going where no other fax has gone before, Murata figures that if it works on Mt. Everest, it'll have no problem in an office.

establishes our ownership of the marketplace."

National corporate ad spending totaled about $20 million this year, with some $6 million going to fax campaigns, according to Daniel Infanti, director of marketing and corporate communications for Sharp. The mix is about 60% print, 40% tv.

The latest tv flight began in November on what Carl Teitelman, vice president, management supervisor for Griffin Bacal, describes as "showcase properties," such as major golf and tennis tournaments, *Monday Night Football* and college football. "This dovetails with Sharp's sports marketing," he explains. "The brand is very active in *Hoop* and *Goal* and other magazines available at sports venues." In addition to sports, Sunday morning news programs are also used.

The consumer-print campaign, which totaled just over $2 million in the 12-month period ended June 30, 1989, includes runs in the *Wall Street Journal*, *Forbes*, *Fortune*, *Newsweek* and *Business Week*. Targeting smaller business, the ads also ran in *Inc.* and *Venture*. Office-management trade books were another important part of the mix and included *The Office*, *Office Systems* and *Copy Magazine*.

Murata

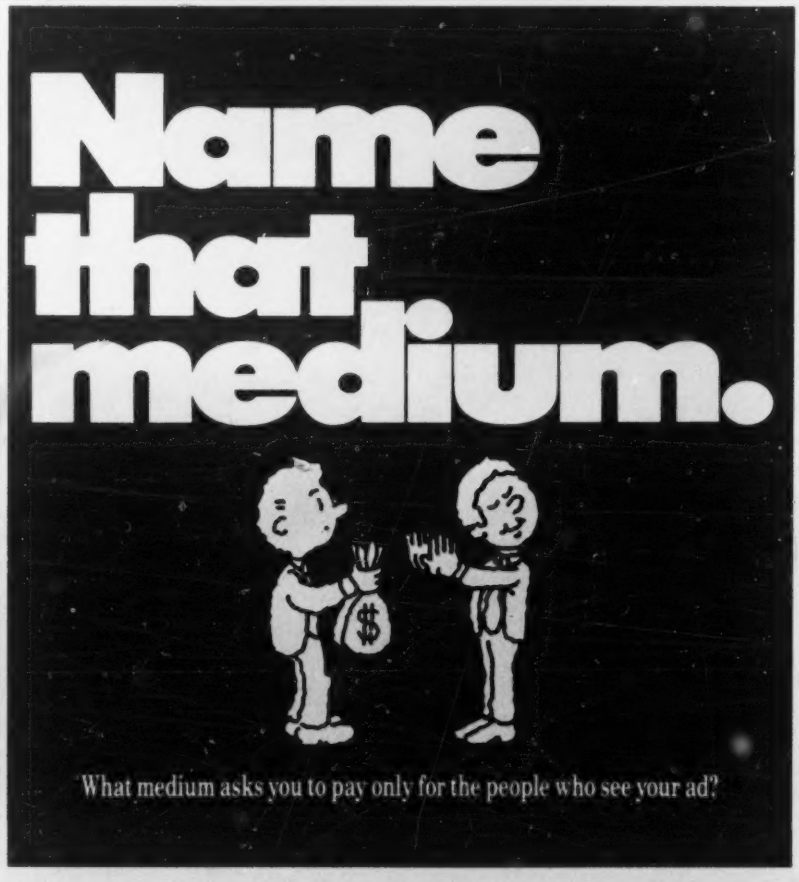
Second-ranked Murata, with about 15%-17% of fax unit sales, is advertising on several levels as it plans to expand from the low end of the market into the middle and upper, according to Mike . ocock, vice president of marketing. "With our corporate image ads, we try to reach all the potential buyers — 25-52-year-old, mostly male decision makers — through tv, radio and print," he says.

The corporate ads from The Richards Group, Dallas, however, air on network tv. Murata was also one of the major sponsors of Wimbledon tennis last year.

Pocock says the sports angle hits the demo. "It's male dominated, and the people we try to reach go to these sporting events," he says. Network tv for fax machines cost Murata $5.6 million for the 12 month period, according to LNA. It also sponsors local events like the Murata Senior Golf Tournament in Dallas, Texas.

In print, fax advertising, which LNA totaled at $2.4 million in the 12 months ending June 30, 1989, appeared in titles that include *Time*, *Forbes*, *Fortune* and *Business Week*, as well as the in-flight magazines.

Network and spot radio were also used to maximize drive times in local markets, according to Pocock. "If you get the right drive time, you get the decision makers on the way to work," he notes.



Since the company segments the market into three different channels of distribution — office systems dealer, consumer electronic and computer reseller — more product-specific advertising is used in an effort to differentiate the product for each channel. In addition to radio and business magazines, trade magazines such as *The Office*, *HFD*, *Computer Resale Channel* and *Byte* are part of the mix.

In some major markets, some ad programs have been executed in newspapers featuring a product and a list of the various area dealers who carry it. Two direct-mail programs, one using ZIP codes and the other that targets selective markets, also have recently been implemented.

Canon

With 13 products in its line, ranging in price from $1,795 to as much as $30,000, the primary thrust right now for Canon is in the plain-paper area to target current fax users in all types of businesses. Says Andrew Johnson, product marketing manager, facsimile division at Canon, "The market knows about the fax machines and has been tolerant with thermal paper and its limitations. Now they're ready for plain paper."

The latest ad campaign from agency DCA, New York, is built around the high- and low-end fax segments. In the high end, the focus is image quality based on Canon's UHQ (ultra-high quality), an image enhancement computer chip that enhances the character before transmission. "The message of UHQ, which is the number-one message, is that the quality of the document sent reflects on you and your company," explains Johnson. "It's a little more of a selfish reason to buy plain-paper [units]."

Johnson says that one of the chief differences with the ad strategy from previous runs in the high end is, "we used to promote technology and wanted to be known as having the most advanced technology in our machines. We have changed from that technology to plain paper," he says. "In the copy of the ad, we talk about the transmission feature and the technology feature, but the meat of the ad is based on the printing."

In the low-end, UHQ is also the emphasis. The creative uses a hand crumpling up fax paper with the tag, "Maybe you're giving people the wrong image." There's no campaign for the middle range, because, according to Johnson, "we find that those get sold as an upgrade."

The ad schedule for the plain-paper models is primarily print, including the *Wall Street Journal*, *Business Week*, *Forbes* and *Fortune*. Print totaled about $3 million for the period July 1, 1988 to June 30, 1989, according to LNA.

For the lower end machines, trade magazines are the medium of choice and include *Modern Office Technology*, *Office Systems*, *The Office* and *Today's Office*.

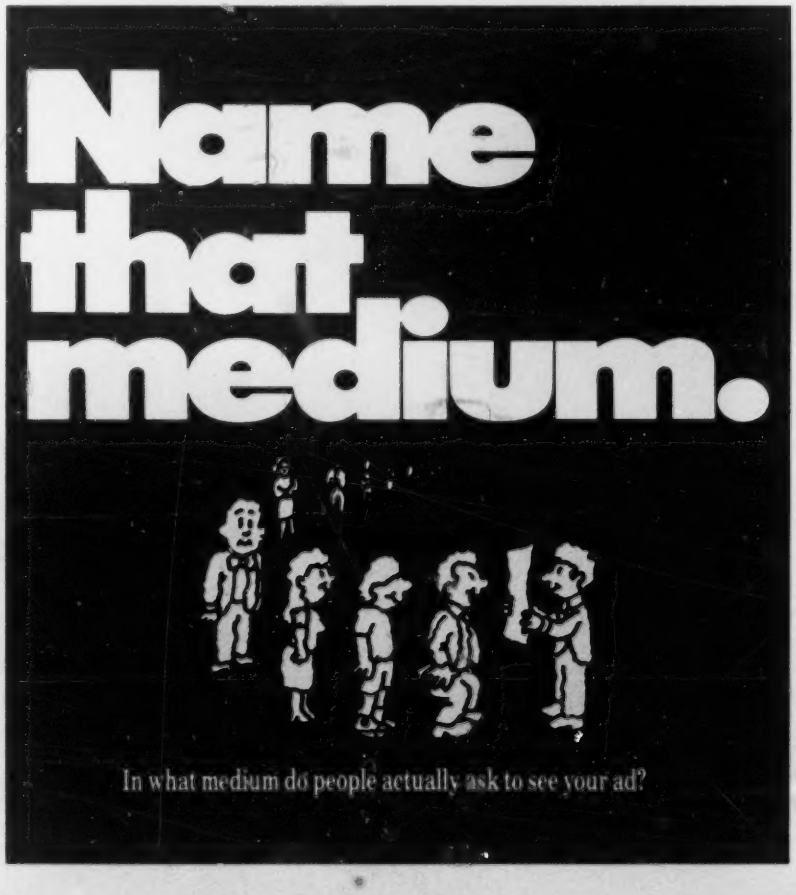
Distribution of the line is through national accounts targeting *Fortune* 500 companies, with the majority of sales going through office-machine dealers.

Ricoh

Ricoh, with about 10%-15% of the market's unit sales, is targeting its line of thermal-paper fax machines to the lower and middle segments, but most of the focus on its plain-paper fax machines is in the higher end, according to Garry Waddell, manager of product planning, facsimile, for Ricoh.

Waddell expects the headline in its latest print campaign, "Ricoh, Where

Canon focuses on image quality based on UHQ processing.



Ricoh thinks its latest headline will become a running theme in future ads from Justamere Associates.

Imagination Becomes Reality," to become a running theme in future ads. "We try to stress the company's historical position as a leading innovator in fax and other technologies," he says. Currently, there are two corporate ads running off that idea, with plans in the works for some product-specific ads for fax.

With the campaign from Justamere Associates, Andover, N.J., Ricoh is taking a new approach. The earlier ads were more emotional, according to Waddell, and were designed to appeal to the hectic nature of an office user. When the machine does not work, suggested the copy, a stressful situation undoubtedly arises.

"That was a very indirect kind of way of getting at the benefits of the product. Now we're going more direct with how we bring good products to the market and what that's going to mean to the user," Waddell says.

Print placements for the "Reality" theme include *Business Week*, *Fortune*, *Forbes*, *U.S. Air* and the top-management edition of *Time*, as well as office equipment trades such as *Modern Office Technology* and *The Office*. The expenditure in magazines tracked by LNA totaled $1.1 million for the 12 months ended June 30, 1989.

Distribution of the line is through a direct salesforce and office-machine dealers, with the company positioning its line in three segments, there is some overlap of buyers.

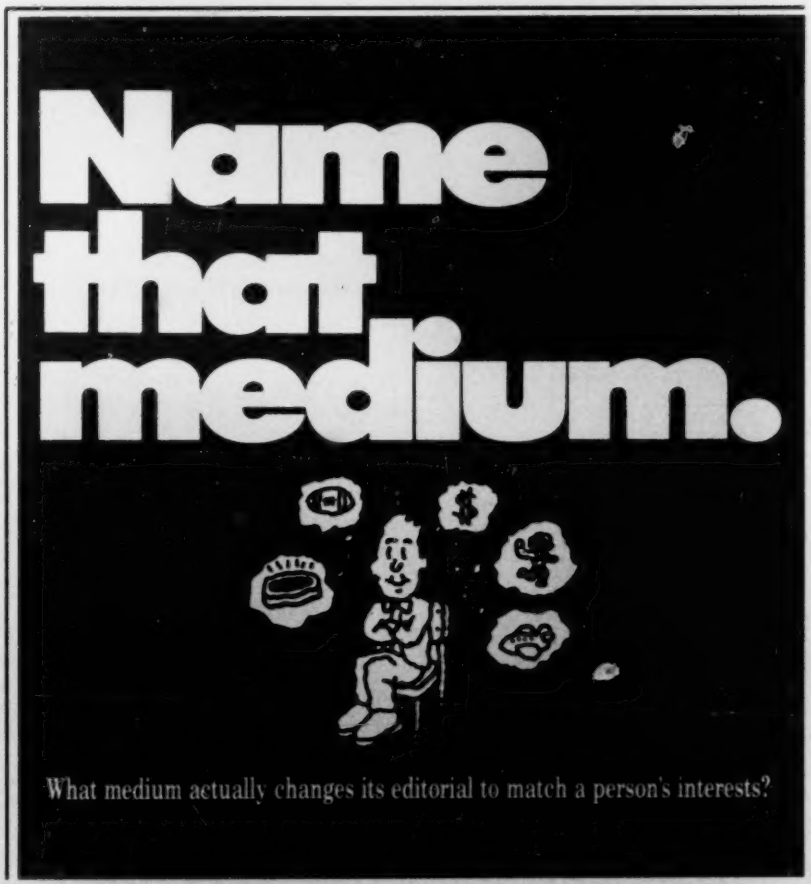
Xerox

Xerox, with its full line of fax machines and an estimated 5%-10% of the unit sales, sees the marketing effort forming two distinct segments — business and home office — and is attacking each one separately.

"On the one hand, with our business-segment products, we will focus our strengths in plain paper and our ability to integrate communications systems," says Jeffery Fischer, manager of facsimile product marketing for Xerox. "On the home-office front, we will be engaging marketing channels that have the ability to reach home offices, like retailers."

The home-office machines are scheduled for release early next year. Although the ad strategy from Backer, Spielvogel, Bates has not yet been defined, Fischer says it will "likely rely quite a bit on our retailing partners on our behalf, but we will do our share to create some end-user awareness as well." Xerox has already commissioned a number of high-volume retailers, including Sears and Dayton Hudson, to sell its home-office copier.

In addition to being a part of the company's omnibus corporate ad campaign, Xerox fax strategy targets specific industries like legal, telecommunications and banking with flights in *Bank Administration*, *Bank News Products*, *Legal Administrator*



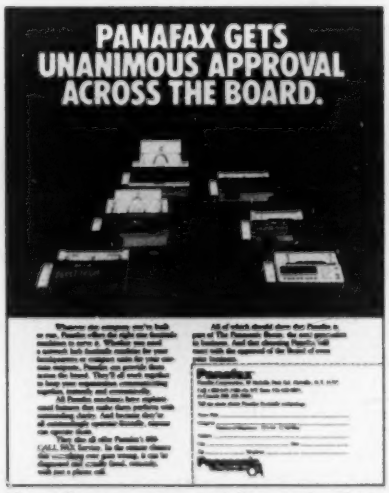
Xerox takes the worry out of fax transmissions with a guarantee.

and *Communications Week*. Also targeted are some office-product publications, such as *Administrative Management* and *The Office*. Business publications are also used and include *CFO*, *Inc.* and *Fortune*.

The creative focus on document delivery is backed up with a fax-transmission guarantee. If a Xerox fax machine does not deliver the document to the intended location, the company will pay $5 for each transmission that does not go through.

Panafax

Recognizing that some kind of application for fax can be found in just about every business, Panafax, a part of the Panasonic Office Automation division of Matsushita Graphic Communication Systems, finds it hard to pinpoint a target for its machines. So print from agency Greenstone Rabasca Roberts, Melville, N.Y., runs in the *Wall Street Journal* and the airline magazines to cover a wide base of readers.



Panafax targets a wide readership base in its print campaign.

Explaining the use of airline magazines, Panasonic's Plet says, "The business traveller is always on the go and needs to get things back home quickly — sales orders, inventory, whatever. Years ago he would have had to pay ten bucks to Federal Express, so fax turns out to be a very good alternative."

With print as the only medium used during the 12 months ending June 30, 1989, LNA pegs consumer magazine expenditures at $332,300. Plet also says office-automation books are used, but he declined to get into specific titles or investments.

Most of the Panafax advertisements are product specific, although there is one ad that features the entire line on a conference room table and with the line saying they get "Approval Across the Board."

Distribution of the line, which ranges in price from $1,395 for a machine without an automatic paper cutter to $5,795 for a plain-paper, fully featured model, is through office-automation dealers and a direct salesforce.

Pitney Bowes

Unlike the other leading brands of fax-machine manufacturers, Pitney Bowes, with an estimated 4% to 6% of the market's unit sales, only uses a direct salesforce to market its line of machines targeted toward the upper end. But although the company's emphasis is the upper end, lower-end machines with fewer features are also offered.

The company just recently reassessed the humorous advertising it began about four years ago. Now, instead of the humor, Pitney Bowes is using a straightforward focus-group setting where users talk about their needs and why they chose Pitney Bowes. This is currently running on CNN, with print scheduled for the first quarter of next year. The print schedule has not been determined, but Kathleen Ryan Mufson, manager of marketing programs at Pitney Bowes, says it will be a mix of trade and business publications.

Animals and miscommunication create humor for Pitney Bowes.

With its previous ads, the company made a double-edged break from traditional fax advertising by adding a light touch to its ads from Venet, Lawrenceville, N.J. At the same time, the company noticed fax becoming more integrated into mainstream business applications and made the move away from telecommunication magazines and into major publications such as *Business Week*, *Newsweek* and the *Wall Street Journal*.

"We added humor into our ads as far as taking the thrust away from spec-sheet-type ads," says Mufson. The ads had several different variations of a person in an office situation, with an almost surreal scene of animals overrunning the office. One finds an executive hanging from a ceiling light over three snapping crocodiles, with the line, "If you ordered clocks and got crocs, you need Pitney Bowes fax." The idea, obviously, is based on miscommunication due to poor quality fax copies. ■

Overnight-delivery costs are high, so fax turns out to be a good alternative.

MEDIA STRATEGISTS: ARE THEY FOR REAL?

POSITION GRANTED

Media is a dynamic, changing function. Influenced by many variables — political, technological, societal, economical and others — it is evolving from a relatively isolated discipline into a fully integrated partner in marketing planning and performance.

The number and range of media options have grown dramatically over the past decade, and this trend is accelerating into the '90s. Both the traditional media and the newcomers, as a result of advances in technology and increased competition and demand, are opening new doors every day for advertisers.

For example, a personalized news medium may be on its way — a combination computer, newspaper and television that "knows" your interests and information needs and is able to present only what's relevant to you. Your morning newspaper may tell you about the agenda of your afternoon meeting, give you a price update on your investment portfolio, fill you in on last night's baseball game and then discuss the implications of Gorbachev's fourth visit to New York.

With the development of interactive tv, commercials will also be targeted specifically to you while your neighbor or children watch the same show on a different set and see a different ad. The Media Lab, a part of M.I.T., has assured us that these new media forms are not fantasies.

The need to comprehend and work with an altered, more complex media environment and its applications on marketing strategies has broadened the role of the media function. It also has necessitated changes in media departments' structures, operations and professional experience requirements.

How do you stay on the cutting edge of such media happenings and capitalize on resulting advertising possibilities early on? There is probably no one answer to this question. Agencies have redefined the position of media planning generalists, looked to outside consultants or have hired specialists.

At Bozell, the addition of a "media strategist" allows for a full understanding and evaluation of the varied spectrum of changes occurring now and the trends establishing themselves for the future. The function provides for an extension of the media knowledge and information base way beyond that made possible by merely expanding the media generalist's role. It gives us the ability to prepare in-depth reports for nontraditional media and to analyze these new developments in conjunction with creative and marketing programs in tandem with more conventional media. The days when each medium was unto itself are long gone.

The strategist's view must go beyond the domestic market. Geographic boundaries will become less and less meaningful, in Europe with the advent of 1992 and elsewhere with the speed of new telecommunication technologies. This means that the number of media combinations and permutations will multiply, as will the buys available. Obviously, these types of packages will not be appropriate for all products and services.

Also under consideration is how best to achieve the proper balance between national and local media. The problem is not a new one, but with retailer power on the increase and in-store opportunities proliferating, local media efforts must be coordinated more closely than ever before with promotional tie-ins and national campaigns.

At Bozell, the focus on media strategy and exploration provides planners in all of our offices with resources to better anticipate and service clients' continually changing needs. It gives planners the background and preparation for playing a more important role in the marketing process. It makes media planning a more vital and essential part of the marketing environment.

Judy Black is vice president and strategic media project manager at Bozell.

OUR READERS TELL US . . .

Research USA, Chicago, reports that most respondents expect their agencies to maintain or increase media department staffing, but few have named employees dedicated to strategic thinking.

1. What changes, if any, does your media department expect in its staffing?

Increased staff	45.1%
Decreased staff	7.4%
No change	47.5%

Base = 122

2. Does your media department use headhunters as part of the hiring process?

Yes	31.8%
No	68.2%

Base = 148

3. Does your media department use temporary help during media planning?

Yes	57.4%
No	42.6%

Base = 122

If "yes," for which functions? (Check all that apply)

Buying	74.1%
Planning	25.9%
Clerical/general office	88.9%

POLL

POSITION SCORNED

At J. Walter Thompson, we've rejected the idea of a single "designated strategist" for the media department. Instead, we employ a host of strategists, each assigned to a limited number of accounts. We call them associate media directors, although we could just as easily refer to them as "account strategists."

Most other advertising agencies also have account-oriented strategists, and while they may possess different titles in different shops, we believe this arrangement best serves the clients' needs. Our philosophy at JWT is that strategy is account-driven. Appointing a "designated strategist" for the entire agency is dangerous for several reasons, not the least of which is it shifts the focus of strategic development further from the client.

The typical AMD at J. Walter Thompson — we have about 20 in our six U.S. offices — has more than 15 years' planning experience. In most cases, he or she works on just one or two major pieces of business. As the account's chief strategist, the AMD has an intimate knowledge of the client's marketing goals, ad strategy and a historical perspective on the brands.

The planners draw up the actual media plans. But it is the AMDs, or the "account strategists," who are charged with establishing the media strategy and ensuring that it is both on target and exploiting opportunities to the maximum. The AMDs make all major decisions such as (but not limited to) setting guidelines for the overall media mix, deciding whether or not to use new media vehicles, recommending whether a client should heavy-up weight during key months, flighting or pulsing patterns, etc.

But not all strategizing occurs at the account level. The media director — the department's chief strategist — gives the AMDs direction on a wide range of issues. Because he or she has a broad view of goings-on for all agency accounts, along with full responsibility for buying and research, the media director can best offer broad strategy and direction.

Our account strategists also have many resources to draw on, including the broadcast-buying groups, the media-research staff, the market-research department and others. Often, differing opinions come from these areas. The account strategist's job is to assess each alternative, consult with the media director and make a recommendation specific to that client.

In some cases, two different AMDs will confront the same issue, utilize the same resources, but ultimately make differing recommendations. Does this mean the system has broken down? Absolutely not. It is a recognition that each client has different priorities.

A "Guru of Strategic Development" cannot be relied on to know the intricacies of each account. He or she lacks the ongoing interaction with the client that ensures new developments will not be overlooked. With such a limited knowledge of any particular client, and what that client's competitors are up to, it is presumptuous to assume he or she can come up with truly breakthrough ideas.

Also, consider the ill-will that could result from the appointment of an "official" media department strategist. If I were to establish this position at JWT, I would be sending a message to our AMDs that strategizing is no longer their responsibility — or that they are incapable of strategizing. Either way, it would be discouraging and demoralizing to them — and disingenuous.

The need for a designated department strategist suggests to me that the AMDs and the media director are not properly fulfilling their responsibilities. If this is the case, solve the personnel problem — but don't duck the issue by "changing the system."

Richard Kostyra is executive vice president, U.S. director of media services, for J. Walter Thompson.

ECONOMIC EYE

AD READERSHIP

According to the NAB's *Key Facts 1989* report, 58% of adults usually read the supermarket advertisements in the newspaper. Women tend to read the ads more than men (73% vs. 40%). Women were also found to be more likely to read department store ads for clothing (again, 73% vs. 40%).

MAGAZINE AD SCORECARD

	Ad Pages Oct. 1989	% change from Oct. 1988	Dollars spent (000)	% change from Oct. 1988
1. Skin care, Creams, Lotions and Oils	278.71	35.4	12,260.7	61.3
2. Lip and Eye Beauty Products	142.96	-1.2	5,472.3	17.9
3. Scents and Fragrances	259.20	-20.2	8,176.8	-12.3
4. Facial Makeup Products	99.49	-34.7	4,389.9	-25.9
5. Prepared Dinners and Entrees (including pizzas)	53.20	96.8	3,641.1	153.0
6. Liquor	513.78	17.8	23,229.6	128.1
7. Cigarettes	643.36	-4.5	38,125.6	0.2
8. Soaps and Detergents	53.29	96.1	3,358.0	119.7
9. Passenger Cars, Domestic	535.24	26.5	35,886.9	41.2
10. Passenger Cars, Imported	746.48	30.8	36,979.6	14.9

Source: Publishers Information Bureau as prepared by Leading National Advertisers.

MEDIA COST INDEX

(The Media Cost Index is based on unit costs, which are the end-product of circulation/audience and CPM adjustments. They do not represent the efficiency of a given medium, only the out-of-pocket costs.)

1985 = 100 ← 1989 →

	Jan.	% change	Feb.	% change	March	% change	Apr.	% change	May	% change	June	% change	July	% change	Aug.	% change
Network TV																
Daytime	77	–17	68	–15	68	–15	72	–7	67	–12	63	–14	71	–11	67	–9
Nighttime	122	+8	120	–19	125	+11	112	+13	127	+16	112	-8	125	+14	135	+14
Spot TV																
Prime time	141	+10	127	–2	125	–4	131	+5	126	+0.3	131	+5	132	+7	134	+7
Daytime	116	–5	120	+11	97	–1	100	+5	101	–1	93	–0.2	107	+0.2	99	-1
Network radio	158	+8	142	+10	139	+15	128	+10	131	+13	126	+8	121	+19	127	+15
Spot radio	–	–	–	–	118	+12	–	–	–	–	118	+17	—	—	—	—
Consumer magazines	122	+6	122	+6	122	+6	122	+6	122	+6	123	+7	123	+7	123	+8
Natl. Sunday magazines	129	+10	129	+10	129	+10	129	+10	130	+12	130	+12	130	+12	141	+10
Business publications	119	+2	119	+2	119	+2	119	+2	123	+6	123	+6	123	+6	123	+6
Newspapers	131	+5	131	+6	131	+6	132	+6	131	+6	131	+6	131	+6	131	+6
Outdoor	137	+11	137	+11	132	+8	132	+8	132	+8	132	+8	132	+8	132	+8

Notes: Percentage shown is relative change from the same month/period the year before.
*Revised

Sources:

Nighttime Network TV- Cost per average 30-second spot, 7:30-11 p.m. Monday-Saturday and 7-11 p.m. Sunday from Broadcast Advertisers Reports' (BAR) Network TV Service.

Daytime Network TV- Cost per average 30-second spot, 10 a.m.-4:30 p.m. Monday-Friday from BAR's Network TV Service.

Network Radio- Cost per average 30-second radio announcement from BAR's Network Radio Service.

Consumer Magazines estimate based on reported SRDS cost of a page, four-color in 40 national consumer magazines, as reported by Magazine Publishers Assn.

National Sunday Mags estimate based on published (rate cards) costs of a page, four-color in the national entries.

Daily Newspapers estimate based on Newspaper Advertising Bureau report of SRDS costs per column inch of a sample of 784 newspapers weighted to represent the universe.

Outdoor Posters based on estimate prepared by Institute of Outdoor Advertising.

Spot Radio index represents cost of a 60-second spot in the top 100 markets from data supplied to Radio Expenditure Reports by major radio representatives.

Business Publications estimates based on reported SRDS cost of a page, four-color in 48 publications representing 42 business and professional classifications.